Get Ready for my|CalPERS with PERT

Supplemental Income Plan

(SIP 457)

Employer Web Conference

Phase One

(August – December 2008)

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PERT Resources - Phase One

You have selected:
- **Legislative Employer**

Edit Your Selection

PERT Resources
- ACES & Other Online Services
- Get Ready for my|CalPERS with PERT
- Benefit Programs & Contracting Services
- Part-Time California National Guard Membership
- Actuarial & GASB 27 Information
- Circular Letters
- Sign Up For CalPERS Employer eBulletin
- Policies & Procedures
- Employer Education & Events
- Employer Forms & Publications Directory
- Tips for Helping Your Employees
- Legislation, Precedential Board Decisions, Regulations & Statutes
- Video Center
- Resource Library
- Contact Us

Employer Information > Get Ready for my|CalPERS with PERT > **PERT Resources**

PERT Resources

The following is a list of resources to help you prepare for the upcoming changes in the reporting payroll and enrollment data to CalPERS.

Phase One (August - October 2008)

- my|CalPERS Decision Maker's Guide to Employer Reporting Requirements (PDF, 118 KB)
  View, download, and print detailed information about choosing a reporting method.
- **Employer Web Conference Presentation Materials**
  Print and view the information that helps you participate in the Employer Web Conferences designed especially for your needs.
  - Supplemental Income Plan (SIP) Web Conference Presentation (PDF, 783 KB)
  - Health Enrollment Web Conference Presentation (PDF, 131 KB)
  - Payroll Contribution and Health and Retirement Enrollment Web Conference Presentation (PDF, 131 KB)
  - Payroll Contribution and Retirement Enrollment Web Conference Presentation (PDF, 124 KB)

PERT Project Information

- FAQs
  Get answers to frequently asked questions related to the roll-out of my|CalPERS to employers.
- Project Background
  Read about PERT's project background to familiarize yourself with CalPERS vision for the future.

Dated: 12-05-2008

Agenda

- » Project Overview
- » Reporting Methods
- » File Formats
- » my|CalPERS Demonstration
- » Important Dates and Next Steps

Project Overview

- my|CalPERS is being expanded for employers to do business with CalPERS
- This new Internet-based business information system will be operational by the end of April 2010
- Public Employer Readiness Team (PERT) is responsible for educating and guiding Employers on the new system

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Project Overview

Education Phases:

- » Phase One – Reporting Methods

  (August through December 2008)

- » Phase Two – Business Policies and Procedures and System Testing

  (Spring through Fall 2009)

- » Phase Three – Provide training on the new my|CalPERS

  (Fall 2009 through Spring 2010)

Project Overview

Why a new business information system?

- » Enhance Security
- » Improve processing times
- » More consistent data accuracy
- » 24-hour real-time access
- » Boost CalPERS service delivery
- » Expand self-service abilities

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Project Overview

	Business Practice Today	my|CalPERS Tomorrow
Employers submit Employee Action Form and Beneficiary Designation Form	3rd Party Administrator ING	3rd Party Administrator ING
Employers submit tax deferred payroll contributions and payments	3rd Party Administrator ING	my|CalPERS
Employees manage their plan investment and personal information by logging in to https://calpers.ingplans.com	3rd Party Administrator ING	3rd Party Administrator ING

Project Overview

my|CalPERS Benefits to Employers

- » Contributions may be processed online
- » CalPERS will receive tax deferred contributions and payments
- » Error-free records will post automatically
- » Employers may view reporting and contribution histories online

Reporting Methods - Overview

	Online Data Entry	File Upload	FTP
File Creation	CalPERS Business System	Employers Business System	Employers Business System
File Transfer Method	No Transfer	Secure File Upload	Secure FTP (System to System)
File Transfer Timing	No Transfer	Employer Initiated	Scheduled
Testing	None	Required	Required

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Reporting Methods

Online Data Entry

- Login to my|CalPERS
- Use online screens to enter data
- “Copy forward” can be used for SIP 457 contribution reporting
- Records that pass business rules check are posted
- Correct rejected records online

Reporting Methods

File Upload Summary

- Created in an XML file format
- Upload file using secure Internet connection
- Business rules check automatically applied
- Records that pass business rules check are posted
- Ability to correct rejected records in real time

Reporting Methods

FTP Summary

- Created in an XML file format
- Scheduled process to transfer a file to CalPERS
  - System-to-system transfer instead of File Upload
- Business rules check automatically applied
- CalPERS will send a response file
- Records that pass business rules check are posted
- Rejected records can be corrected by an adjustment file or online

Reporting Methods

Factors to Consider:

- » Number of employees
- » Number of changes during each reporting period
- » Availability of:
  - Technical resources
  - Administrative resources
- » System flexibility
- » Method is available for use by “go-live” date
- » Third-party vendor or software vendor has capability to meet file format requirements

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Reporting Methods

Selecting a reporting method

- If you are contracted with CalPERS for SIP contributions and report directly to CalPERS, you will be required to select a reporting method.
- If you submit SIP contributions to CalPERS through another agency, you will select “submitted through another agency.”
- You’ll be able to change the reporting method whenever you want. However, you must first contact PERT and request a consultation.

File Formats

Four Files

- Payroll Contribution Reporting File
- Retirement Enrollment Reporting File
- Health Enrollment Reporting File
  (Public Agencies/Schools)
- Health Enrollment Reporting File
  (State Agency – includes California State University)
- Schemas

File Formats

Locate File Formats on the PERT area of CalPERS On-Line

www.calpers.ca.gov/pert

Employer Information > Get Ready for my|CalPERS with PERT > PERT Resources > **File Formats**

File Formats

Use these sample files and schemas to help you understand the file layout and structure. We will give you updated formal documents, schemas, and other required files in Phase Two of PERT's Employer Education Outreach.

Payroll Reporting

- Payroll Contribution Reporting File (PDF, 160 KB)
  This sample file provides a list of data fields that you will be asked to provide CalPERS in the payroll reporting process.
- Payroll File Schema
  Find the sample schema for the new payroll file.

Retirement Enrollment Reporting

- Retirement Enrollment Reporting File (PDF, 218 KB)
  This sample file provides a list of data fields that you will be asked to provide CalPERS in the retirement enrollment process.
- Enrollment Schema
  Find the sample schema for the new retirement and health enrollment files.

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File Formats

Participant's CalPERS ID

- CalPERS will generate
- 10-digit unique ID
- Replaces Social Security Number
- Protects our Members' data

File Formats

Employer’s CalPERS ID

- CalPERS will generate
- 10-digit unique ID
- Replaces Employer and Unit code

File Formats

Appointment ID

- » Found in all three files
- » 10-digit unique ID
- » CalPERS will generate

Note: More information pertaining to the Appointment ID can be found within the PERT File Format area of CalPERS On-Line.

File Formats

Some New Data Elements for Payroll Contribution File

- Supplemental Income Plan (SIP) ID
- SIP Count
- SIP Total

- CalPERS will generate ID
- Required for File Upload/FTP
- Accessible for online data entry

Important Dates

Phase Two

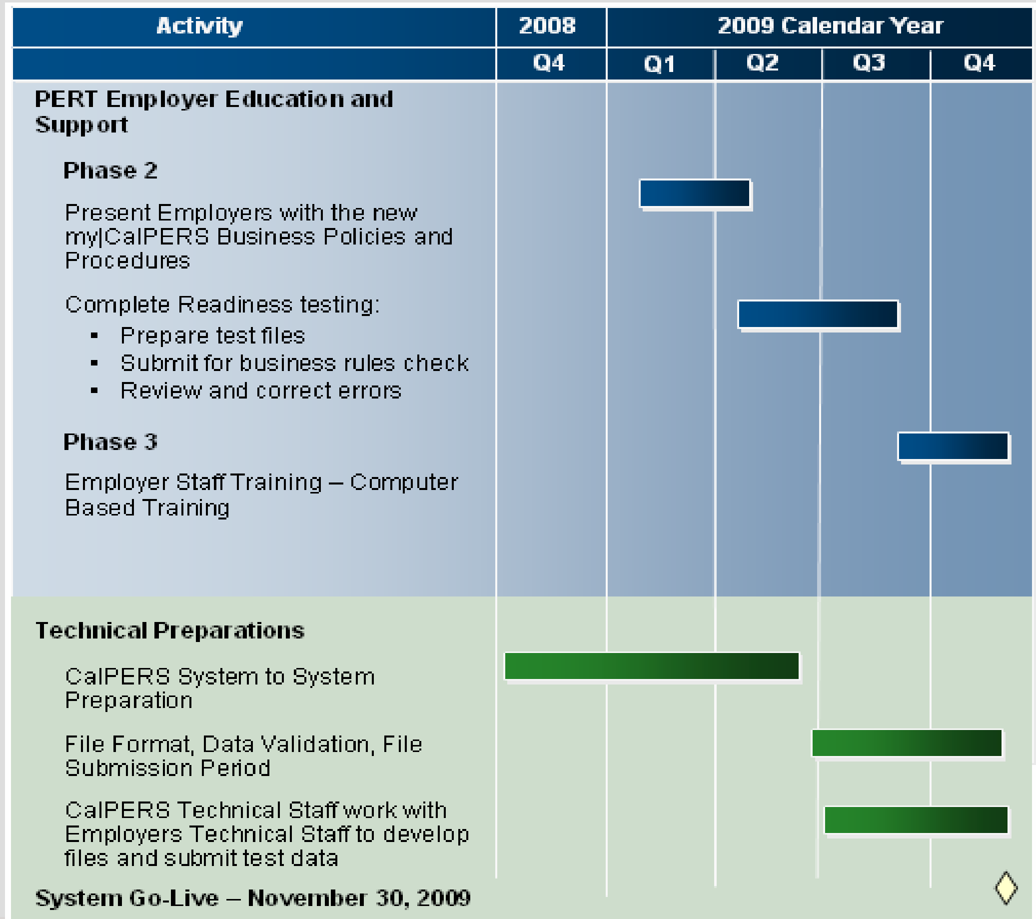
(Spring through

Fall 2009)

Phase Three

(Fall 2009 through

Spring 2010)



Thank you for attending!

- » Today's PowerPoint presentation is located on the PERT area of CalPERS On-Line at
  - www.calpers.ca.gov/pert
- » If you don't know which reporting method to select, contact PERT for a consultation
  - PERT Email: PERT4U@calpers.ca.gov
  - Employer Contact Center (ERCC):
    - » **888 CalPERS** (or **888**-225-7377)
- » Commonly asked text questions may appear on the PERT Web page under the FAQ section